Job Aid:

How to Create a Bid using a Requisition

This Job Aid shows how to:

- Create an Open Market Requisition in COMMBUYS
- Convert a Requisition to a Bid

Of Special Note:

Bids are documents used to request price quotes from potential vendors for goods or services. Bids can either be a one-time request for goods and services, which would turn into an open market purchase order, or they can become a Master Blanket PO in COMMBUYS (formerly known as a contract or Master Agreement).
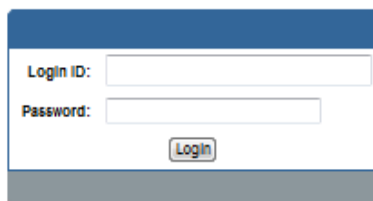
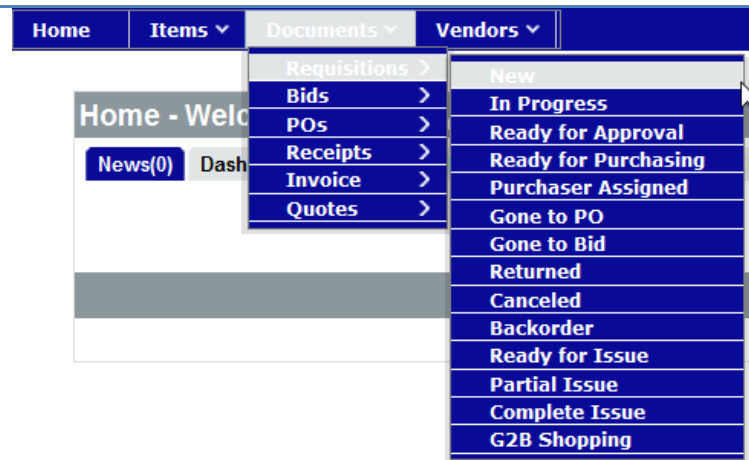| Screenshot	Directions
	1. Launch the COMMBUYS Web site by entering the URL https://www.commbuys.com/bso/ in the Browser. Enter your login credentials and click the **Login** button on the COMMBUYS home page.

Job Aid:

How to Create a Bid using a Requisition

Screenshot	Directions
	2. Upon successful login, if you have multiple roles in COMMBUYS, select the **Basic Purchasing** role tab on the upper right side of the page.

Basic Purchasing Inquiry

January 6, 2014 6:24:20 PM EST

3. From the Navigation Bar, select **Documents > Requisitions > New**

Home   Items ˅   Documents ˅   Vendors ˅

Requisitions   >   New
Bids   >   In Progress
POs   >   Ready for Approval
Receipts   >   Ready for Purchasing
Invoice   >   Purchaser Assigned
Quotes   >   Gone to PO
                 Gone to Bid
                 Returned
                 Canceled
                 Backorder
                 Ready for Issue
                 Partial Issue
                 Complete Issue
                 G2B Shopping

Home - Welc

News(0) Dash

4. The General tab for the requisition opens. On the left side of the screen, complete the following fields:

- **Department**: defaults from user profile. May be changed, using the dropdown if other departments are available to user.
- **Location**: defaults from user profile. May be changed, using the dropdown if other locations are available to user.
- **Required by Date**: optional
- **Requisition Type**: Open Market
- **Requester**: user that created the requisition; this field cannot be edited
- **Contact**: contact for this requisition
- **Estimated Cost**: calculated by COMMBUYS; not editable by user
- **Alternate ID:** leave blank

New Requisition

General Items Address Accounting Routing Attachments Notes Reminders Summary

Requisition Number:

Status: 1RI - Requisition In Progress (When User request is created)

Department*:   00100 - PETS PLUS

Location*:   100 - BOS-PP

Required By Date:

Requisition Type :

Requestor: Buyer Buyer

Contact: Buyer Buyer

Alternate ID:

Estimated Cost: $0.00

Print Format: *
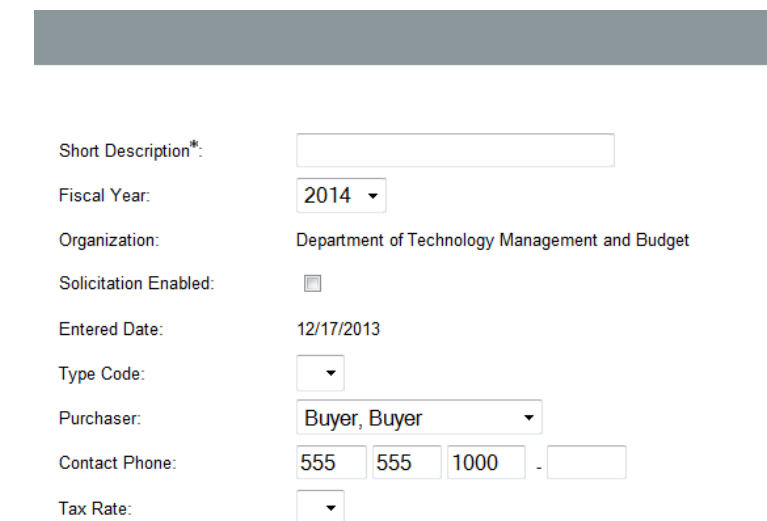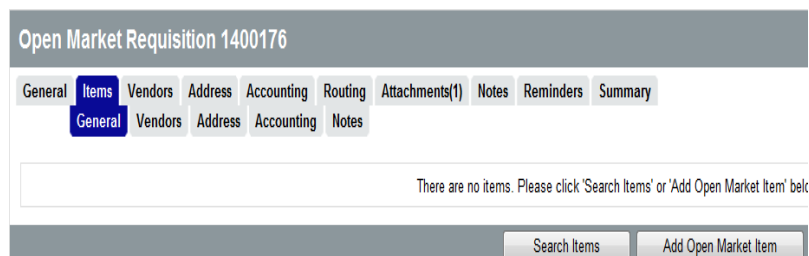
Screenshot	Directions
	5. The right half of the **General** tab, complete the following fields: • **Short Description**: be specific as this field is also used as search criteria to locate a requisition; may use any Departmental Identifier numbers. • **Fiscal Year**: defaults to the current Fiscal Year • **Organization**: default value based on your user profile and can only be changed by an administrator • **Solicitation Enabled**: only select if this is not an open market requisition • **Entered Date**: defaults to the current date and cannot be changed • **Type Code**: type options are based upon the requisition type • **Purchaser**: defaults to your name; use the dropdown to select a different purchaser • **Contact Phone**: defaults to the profile value; can be updated as needed • **Tax Rate**: n/a for Commonwealth When complete, click the **Save & Continue** button to save the information entered on the General tab.

Screenshot fields:

Short Description*: [   ]
Fiscal Year: 2014 ▾
Organization: Department of Technology Management and Budget
Solicitation Enabled: ☐
Entered Date: 12/17/2013
Type Code: ▾
Purchaser: Buyer, Buyer ▾
Contact Phone: 555 555 1000 - [   ]
Tax Rate: ▾

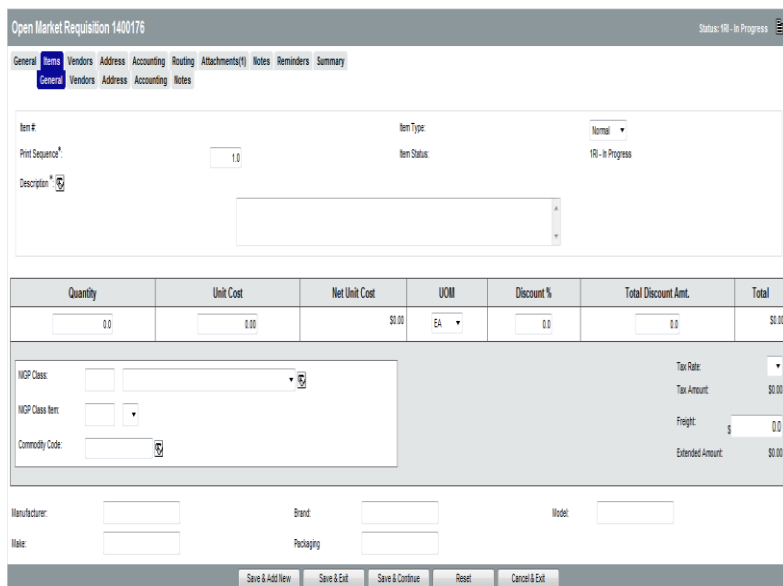|	
Open Market Requisition 1400176 General **Items** Vendors Address Accounting Routing Attachments(1) Notes Reminders Summary **General** Vendors Address Accounting Notes There are no items. Please click 'Search Items' or 'Add Open Market Item' belo [Search Items] [Add Open Market Item]	6. To add items to the requisition, click on the **Items** tab. Click the **Add Open Market Items** button to begin the process of adding items to the requisition.

Screenshot	Directions
	7. The **Items** tab opens to a blank entry form to add either an Open Market or Narrative item to the requisition. The following are fields that should be completed for an open market item: • **Item #:** COMMUYS automatically sequentially numbers each item added to the requisition • **Item Type**: two options: ○ Normal – default value ○ Narrative – permits the addition of a non-item to allow an additional description to appear on the requisition • **Print Sequence #***: change this field if the order the requisition line items should print is different from the Item # order • **Item Status**: COMMBUYS auto updates based on the requisition status. • **Description***: description of the item or service; can hold up to 100 characters. • **Quantity**: enter quantity if known or enter 1 if unknown • **Unit Cost**: enter cost of item/service per 'unit' of quantity • **Net Unit Cost**: COMMBUYS auto updates • **UOM**: unit of measure; how the item is sold/packaged/purchased • **Discount %**: percentage discount for item/service if applicable • **Total Discount Amt.:** total amount of discount – populate based on cost and discount % • **Total:** COMMBUYS auto updates • **UNSPSC:** each item/service is required to have a corresponding UNSPSC code, use the eye glass icon to search and select the most appropriate UNSPSC class (more detail on Step 8) • **Freight:** enter freight costs if known Note: Fields marked with **(*)** are required. If a field is not included in the above list, it is an optional field.

Screenshot	Directions
	8. Click the eyeglass icon to add UNSPSC codes to the item/service. The Search Code screen populates, use the available search dropdowns and fields to find the best code. Select the radio button on the left side of the screen and click the **Save & Exit** to return to the Items tab.
	9. After each item is added to the requisition, there are five options: • **Save & Add New** – saves the item to the requisition and opens a new item entry so additional items can be added • **Save & Exit** – saves the item, closes the item entry page and returns to the Requisition Items General tab • **Save & Continue** – saves the item and remains on the item entry page • **Reset** – removes the item from the requisition without saving it • **Cancel & Exit** – cancels the item and exits from the item entry page. Repeat steps 6 and 9 until item entry is complete.
	10. Once complete, review the requisition item(s). Next, select the Requisition Items **Address** tab.

Screenshot	Directions

Open Market Requisition 1400176

General **Items** Vendors Address Accounting Routing Attachments(1) Notes Reminders Summary
General Vendors **Address** Accounting Notes

Item Address Validation Errors
- Item # 1, 2: No ship-to address, and there is no valid ship-to address at header level.

Item #	Description	Ship-to Address
1	Blue Fine Point Pens	
2	yellow highlighters	

Ship-to Address: [ ] Apply to Selected | Apply to All Items | Reset Selected to Header

Bill-to Address: [ ] Apply to Selected | Apply to All Items | Reset Selected to Header

Save & Continue

11. **The Requisition Items Address** page opens. Displayed here is the left side of the page with the Ship-to Address. Update this if items are being shipped to multiple locations or to an address different than the Bill to Address.

The Address page should prefill – if no change is required go to step 16.

If there is an error message indicating that no valid ship-to address exists. Click on the look-up (eyeglass icon) to select a ship-to address.

You can either select the Ship-to-Address for each item or use the Ship-to-Address at the bottom of the page to search and apply to all items.

Lookup Item Ship-to Address - Open Market Requisition 1400176/ ItemNbr:1

Search Using: ALL of the criteria ▼

Search Fields:

Department ID		Department Name	PETS
Department Suffix ID		Department Suffix Name	
Location ID		Location Name	
City		County	

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Find It   Clear

12. Enter the search criteria. Click **Find It** to view the search results.

If no criteria is known clicking **Find it** will return all possible organization addresses.

Select	Department ID	Department Name	Department Suffix ID	Department Suffix Name
◉	00100	PETS PLUS	100	10055

Select   Close Window

13. The search results display.

Select the desired Address by clicking the radio button in the Select column.

Click the **Select** button.

Screenshot	Directions
Open Market Requisition 1400176 General **Items** Vendors Address Accounting Routing Attachments(1) Notes Reminders Summary General Vendors **Address** Accounting Notes **Item Address Validation Errors** • Item # 1, 2: No ship-to address, and there is no valid ship-to address at header level. | Item #	Description	Ship-to Address | 	1	Blue Fine Point Pens	100 - 10055 Anne Bell One Congress Street 11th floor Boston, MA 02114 US Email: linda.banks-grant@accenture.com Phone: (617)999-9999 | 	2	yellow highlighters	| Ship-to Address: [ ] Apply to Selected Apply to All Items Reset Selected to Header	14. The pop-up window closes and the selected address populates. Repeat steps 11 – 13 if you need to add a different Ship-to Address for each requisition line item.
Open Market Requisition 1400176 General **Items** Vendors Address Accounting Routing Attachments(1) Notes Reminders Summary General Vendors **Address** Accounting Notes | Item #	Description	Ship-to Address | 	1	Blue Fine Point Pens	100 - 10055 Anne Bell One Congress Street 11th floor Boston, MA 02114 US Email: linda.banks-grant@accenture.com Phone: (617)999-9999 | 	2	yellow highlighters	100 - 10055 Anne Bell One Congress Street 11th floor Boston, MA 02114 US Email: linda.banks-grant@accenture.com Phone: (617)999-9999 | **Save & Continue**	15. Once all Ship-to Addresses are added to the requisition, click **Save & Continue** located at the bottom of the page to save the changes. The page will save, refresh and the error messages disappear. Next click the **Vendors** tab.

Job Aid:

How to Create a Bid using a Requisition

Screenshot	Directions
General	Items	**Vendors**	Address	Accounting	Routing	Attachments	Notes	Reminders	Summary Vendor Validation Warnings • No recommended vendor. 	Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Remit-to Address	 ☐ Publish Informal Bid On Web ☐ Show Unit Prices to Vendors ☐ Allow Vendor to Change Quantity ☐ Allow Vendor to Change UOM Select bidder participation ○ Unrestricted informal bid, all vendors can view and respond ○ Restricted informal bid, only selected vendors can view and respond **Informal Bid Date Section** Bid Ending Date:*(MM/DD/YYYY HH:MM:SS AM or PM) [ ] 📅 Bid Available Date:(MM/DD/YYYY HH:MM:SS AM or PM) [ ] 📅 Purge Date:(MM/DD/YYYY) [ ] 📅 [Save & Continue] [Lookup & Add Vendors] [Print] Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	16. On the Vendor tab click the **Lookup & Add Vendors** button at the bottom of the page.
Lookup & Add Reference Vendors - Requisition RQ-15-1080-1080C-1080L-00000000804 Search Using: [ALL of the criteria ▼] [Find It] [Clear] Search Fields: Vendor ID [ ] Vendor Name [ ] Vendor Tax ID [ ] Vendor Legal Name [ ] Show ☐ Vendor Keyword [ ] Alternate ID [ ] ZIP Code [ ] County [ ] State [▼] A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 10 [Find It] [Clear] [Find Vendors for All Commodity-EPP on the Req] [Close Window] Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	17. A popup window appears with a Vendor advanced search page. Enter vendor search criteria, click **Find It** and select the desired vendor(s) from the search results. Click **Save & Exit** to return to the Vendors tab. Alternatively, scroll to the bottom of the page and click **Find Vendors for All Commodity-EPP on the Req**

Screenshot	Directions

| | **18.** The results will display with the Vendors who selected the same commodity code as the bid item(s). |

Select | **Vendor ID** | **Vendor Name** | **Alternate ID** | **Last PO Date**

☐	00000267	Barker Steel LLC / Harris Rebar		
☐	300219	Biomarine, Inc.		
☐	300049	Clean Harbors		Mar 31, 2014
☐	222129	1-Stop Design Shop, Inc.		Mar 31, 2014
☐	207441	146 SUPPLY CENTER INC		Apr 7, 2014

Click the top Select button to check all the Vendors.

Click **Save & Exit** to return to the Vendors tab.

Message from webpage

⚠ Warning: All vendors have been selected for email notification. A large quantity of vendors may take several minutes to process.

OK
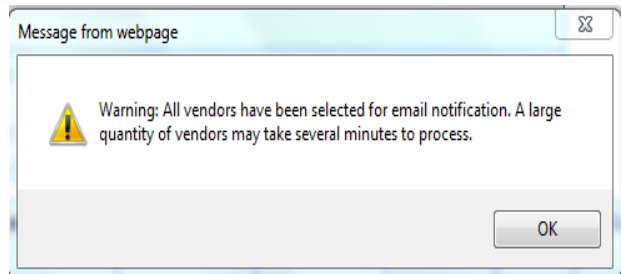
19. A popup window displays with a Warning Message.

Click **OK**. The popup window will disappear and all information populates in the requisition.

---

20. The **Vendors tab** will now display all the Vendors you selected.
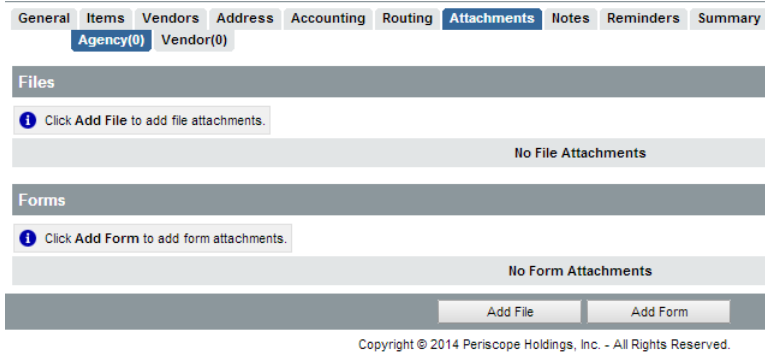
You can delete vendors by using the left Delete column, and/or you can continue to add Vendors by clicking **Lookup & Add Vendors**.

- generally Vendor should not be deleted from open bids

Screenshot	Directions
General	Items	Vendors	Address	Accounting	Routing	**Attachments**	Notes	Reminders	Summary — **Agency(0)** Vendor(0) **Files** ⓘ Click **Add File** to add file attachments. No File Attachments **Forms** ⓘ Click **Add Form** to add form attachments. No Form Attachments Add File Add Form Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	21. Click the **Attachments tab.** The Attachments tab is where all files attached to the requisition display. Click the **Add File** button. **Note:** Add Form is not currently a working function in COMMBUYS
Add File ⓘ **Name** is the display name for the file that will appear where attachment repository files are displayed. It can be different fro... Name*: Description: File*: Browse... Location: agency Save & Exit	22. The Add File window opens. Complete the following fields: • **Name** – required; but will be populated with the file name if left blank • **Description** - optional Click the **Browse** button to select a file.
Add File ⓘ **Name** is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters, spaces, and... Name*: attachment two Description: attachment two of two File*: C:\My Files\1 - Commonwealth of Massachusetts\1 - Training\Trainin Browse... Location: agency Save & Exit Save & Continue Reset Cancel & Exit	23. The Name field prefills with File Name and may be edited to better describe Document being attached. The Description field – you may enter a description. Not required To add another file, click the **Save & Exit** button**.** Repeat as necessary until all required documents are added.
Open Market Requisition 1400176 General	Items	Vendors	Address	Accounting	Routing	**Attachments(2)**	Notes	Reminders(1)	Summary — **Agency(2)** Vendor(0) **Files** | Name	Description	Show Vendor	
Meeting format.docx		☑	
attachment two	attachment two of two	☑		 **Forms** ⓘ Click **Add Form** to add form attachments. No Form Attachments Save & Continue Add File	24. Attachment tab redisplays with a list of attached files. .
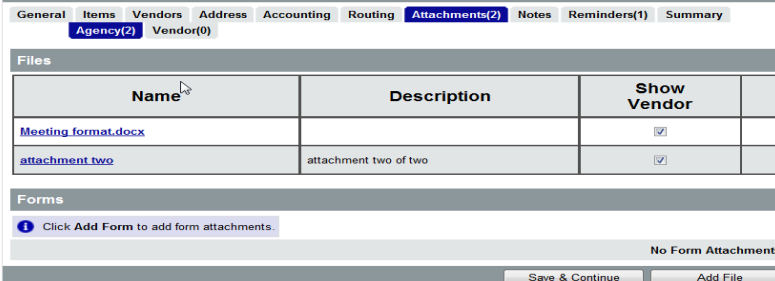
Screenshot	Directions
Open Market Requisition 1400176 General Items Vendors Address Accounting Routing Attachments(2) Notes Reminders **Summary** Overall Validation Warnings • Item # 1, 2: No vendor, and there is no recommended vendor at header level. Header Information Requisition Number: 1400176 — Short Description: Test Requisition Organization: Operational Services Division Department: 00100 - PETS PLUS — Location: 100 - BOS-PP Entered Date: 12/17/2013 — Requisition Type: Open Market Requestor: Buyer Buyer — Purchaser: Buyer Buyer Contact: Buyer Buyer — Contact Phone: (555)555-1000 Estimated Cost: $787.50 — Print Format: Solicitation Enabled: No Ship-to Address: — Bill-to Address: Inventory User, 211 E. 7th Street, Suite 1100, 211 E. 7th Street, Austin, TX 78701, US, Email: gflores@periscopeholdings.com, Phone: (512)666-9403 Attachments: Meeting format.docx, attachment two	25. Click the **Summary tab.** The **Summary tab** displays a summary view of the completed requisition. Click **Submit for Approval** at the bottom of the page. Skipped Tabs: • **Accounting**: Phase II • **Routing**: populates after submission for approval • **Notes**: optional, only viewed internally • **Reminders**: optional, internal reminders sent to organization users
Home	**Items ∨**	**Documents ∨**	**Vendors ∨** Requisitions > New Bids > In Progress POs > Ready for Approval Receipts > Ready for Purchasing Invoice > Purchaser Assigned Quotes > Gone to PO Gone to Bid Returned Canceled Backorder Ready for Issue Partial Issue Complete Issue G2B Shopping Home - Welc... News(1) Dash... News ID 3	26. Once approved, locate the approved requisition by using the Documents dropdown from the Navigation bar. • **Documents > Requisitions > Ready for Purchasing** The requisition will also be in your control center under **Reqs** and **Ready for Purchasing**.
Requisitions - Ready for Purchasing **Requisition #** / **Requisition Date** 1400329 / 01/13/2014 1400307 / 01/09/2014 1400306 / 01/09/2014 1400302 / 01/09/2014 1400289 / 01/07/2014 1400275 / 12/26/2013 1400188 / 12/18/2013	27. Requisitions meeting the criteria display. Click the desired blue hyperlink in the **Requisition #** column to open the Bid.
Convert to Bid Convert to PO Cancel Requisition Clone Requisition Print	28. The requisition opens to the **Summary** tab. Scroll to the bottom of the page and click the **Convert to Bid** button.

Screenshot	Directions
	29. Click the **OK** button to confirm.

Message from webpage

Are you sure you want to convert this requisition to a bid?

OK   Cancel

Open Market Bid 00000144

General | Items | Address | Accounting | Routing | Attachments | Notes | Bidders | Questions | Amendments | Q & A | Remi

General Validation Errors
- The following required fields are missing: bid opening date, available date.

Bid Number:	00000144
Status:	2BI - In Progress
How Solicited:	Email
Department:*	BSAS - Bureau of Substance Abuse Services
Location:*	2300 - Central SA
Show on Web:	☑
Required Date	01/14/2014
Available Date :*(MM/DD/YYYY HH:MM:SS AM or PM)	
Bid Type:	Open Bid
Control Code:	
Print Dest Detail:	Always
Purchase Method:*	Open Market
Tax Rate:	
Item Single Award Only:	☐

30. The Bid screen opens to the **General** tab where any necessary updates can be made.

All information from the requisition is populated into the Bid.

The fields that require completion include:

- **Available Date** – Enter the date the Bid (solicitation) is made available to vendors to submit quotes. Click the calendar icon to set the desired month, day, and time.

Status: 2BI - In Progress

Summary

Description:*	Snow Man Party
Purchaser:*	Buyer, Buyer
Type Code:	
Fiscal Year:	2014
Organization:	Operational Services Division
Allow Electronic Response:	☑
Bid Opening Date:*(MM/DD/YYYY HH:MM:SS AM or PM)	
Purge Date:(MM/DD/YYYY)	
Informal Bid:	☐
Estimated Cost:	$750,050.00
Alternate ID:	
Print Format: *	Bid Print
Solicitation Enabled:	No
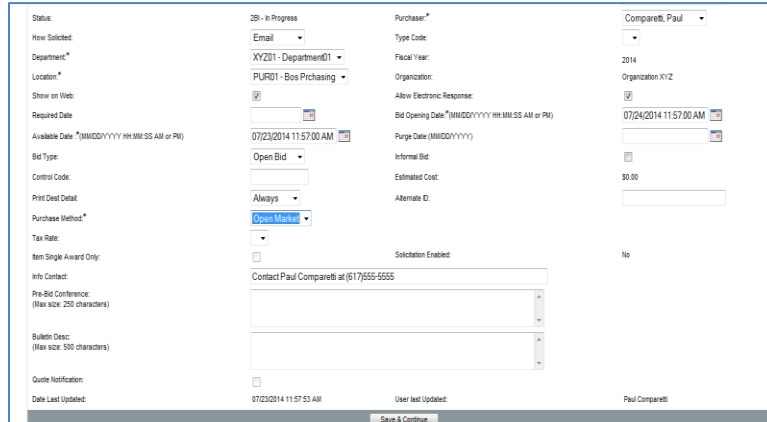
- **Bid Opening Date** – date the Bid will close and quotes can be opened for viewing. Click the calendar icon to set the desired month, day, and time.

Screenshot	Directions
	31. The following options display in the **Purchase Method** dropdown: • Open Market: (For a one time purchase/award) • Contract: (Do not use this option) • Blanket: (If the Bid is going to result in a contract award) **Note: The Contract option should never be selected**
	32. If **Blanket** is selected, a pop-up message appears. Click OK and two new fields display and must be completed: • **Blanket Begin Date**: (estimated contract begin date) • **Blanket End Date**: (estimated contract end date)
Type Code:	33. From the **Type Code** dropdown select one of the following: • **SW**: (bid for a statewide contract) • **NS**: (bid for a non-statewide, departmental contract) Click **Save and Continue** to save all changes.
Open Market Bid 00000014 General Items Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary	34. Click the **Items** tab. The Items tab for the Bid opens. Click the **Address** tab. Verify the Ship-to and Bill-to address. Click the **Attachments** tab. Verify and/or add files to the Bid if needed. To add a file, click the **Add File** button. The **Amendments** tab has no functionality until after the Bid is posted. **Note**: Review all information on the above tabs to ensure data is imported accurately from the Requisition.

Screenshot	Directions
	35. Click the **Bidders tab**. There is no Vendor tab on the Bid. COMMBUYS now refers to them as Bidders. All Vendors entered on the requisition will now be listed as Bidders. In most cases, the Bid will be open, so there is no need to click either radio button for Unrestricted or Restricted bid. • If a restricted bid is desired, click the radio button next to **Restricted bid, only selected vendors can view and respond.** If you want vendors to see your price, select the **Show Unit Prices to Vendors** checkbox, and deselect the **Hide Bid Holder List on Vendor Side** checkbox**.** To add more Bidders, click **Lookup & Add Vendors** button**.** If any changes have been made click, **Save & Continue.**
	36. Click the **Questions** tab. Ask vendors questions by entering text in the **Question** field. Select the **Required** checkbox if the questions must be answered before the quote can be submitted by the vendor. Select a value from the **Response Type** drop-down list to establish a format for the vendor response. Select the **Save & Continue** button to save your entries.
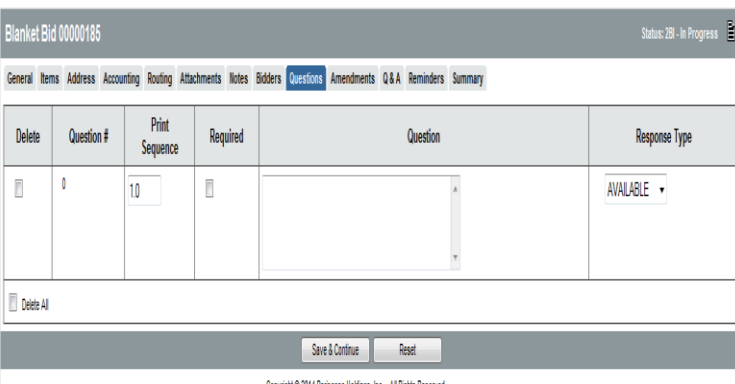
Screenshot	Directions
	37. Click the **Q&A** tab. To dialogue with vendors, select the **Allow vendor to submit questions** checkbox. If you would like COMMBUYS to notify you when a vendor submits a question, select the **Send notification when vendor submitting question** checkbox. If desired, you and/or the vendor can enter a **Question Subject** and **Question** into the respective fields, and the other party can respond in the **Answer** field. If you wish to display the dialogue on the Web, select the **Show on Web** checkbox. The **Show Original Vendor Only** checkbox is available if appropriate.
	38. If desired, click the **Reminders** tab to send a reminder to yourself or another person within your organization. Use the calendar icon in the **Due Date** field to select the date of the reminder then enter your reminder text in the **Comment** field. Select yourself or another internal recipient in the drop-down menu next to the **Remind Whom** field. If you would like to send a "tickler" or pre-notification in advance of the reminder, enter the number of days of the pre-notification in the **Days Prior to Reminder** field. If you would like the reminder send via email, select the **Send Email** checkbox. When complete, click the **Save & Continue** button.
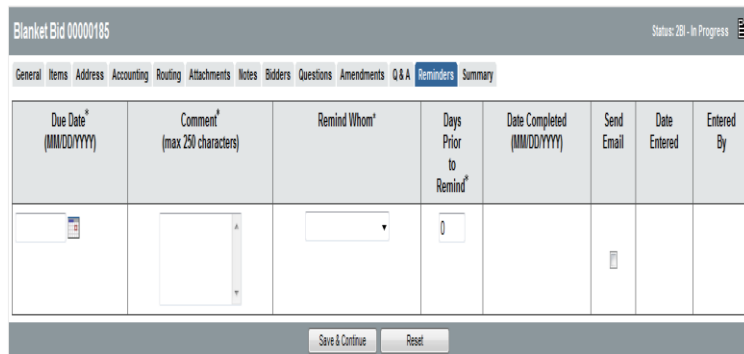
Screenshot	Directions
	39. Click the **Summary** tab to review the bid information. Scroll to the bottom of the page and click the **Submit for Approval** button. A pop up message appears asking if you want to submit this bid. Click **OK**
	40. Once the bid is approved, return to the Summary page and scroll to the bottom of the page and click the **Send Bid** button. This will notify any vendor listed on the bid as well as post it on COMMBUYS for all vendors to search and bid on.

Screenshot	Directions
	41. Click the **OK** button to complete the process. The Bid status updates to 'Sent' and will appear on COMMBUYS based on the available date and bid opening dates.